

EXHIBIT A



REGISTER OF WILLS
TERM REPORT
2020-2024
THE HONORABLE TRACEY L. GORDON



**HELPING PHILADELPHIA PROTECT
THEIR GENERATIONAL WEALTH EVERY DAY.**

PHILA.GOV/WILLS
@PHLROW



DEFENSEB00459



WELCOME

Tracey L. Gordon

MADAM REGISTER

It has been a pleasure to serve the City of Philadelphia as Register of Wills "ROW" and Clerk of Orphan's Court. As my leadership term ends, I'd like to express my heartfelt gratitude to the citizens of Philadelphia for giving me the title of Madam Register serving as the first black and woman in this position. I've worked diligently to exceed your expectations for rewarding me the title of "honorable" and fully intend to continue this economically, socially and spiritually redeeming mission. We've shared many accomplishments and have overcome major challenges all leading to a friendlier and engaging city department that represent the communities we serve. Our mission is to preserve generational wealth and posterity for all Philadelphians by assisting in the Planning, Preparation and Protection of their assets.

Within my first 100 days in office we created the Plan, Prepare, Protect tour to educate our citizen on proper legacy transfer of generational wealth. Our momentum kept building until the unprecedented COVID-19 pandemic was declared in March. Unabashedly, our team-work made a nonessential office "essential" and by April 6th, 2020, we became the first county in Pennsylvania to resume business by introducing Virtual Services for emergency Marriage Licenses and Probates. Virtual Hearings and Virtual Community Seminars soon followed.

Outlined below is a comprehensive snapshot of those referenced attainments. It aims to provide insight into the challenges we've faced, the achievements we've celebrated, as well as the financial well-being we've maintained during the Unprecedented global COVID-19 shut down. While compiling this document, my team and I enjoyed reminiscing about the energy and enthusiasm of my early days in office. In my first month alone we:

- We established Community Outreach virtual offices for the first time in the Philadelphia. Previously the ROW office had no community outreach initiative to inform various constituencies of their paths to generational wealth. Included in our assiduous education was the knowledge and importance of creating a Will and the opportunities for family members to access their deceased relatives' assets. This outreach has included senior care centers, community development centers, community & corporate events, funeral directors, to name a few.
- We launched my flagship program - the Probate Deferment Initiative (PDI) - which was created to connect families with the resources needed to untangle titles.
- We advanced Tangled Title studies with the PEW Charitable Trust. Tangled Titles are where a deed is "titled" in the name of a deceased person. That study revealed 11,000-14,000 tangled titles located in Philadelphia amounting to approximately \$1.2 Billion in generational wealth impacting primarily low and moderate income communities in Philadelphia.
- We advocated with Philadelphia City Council to secure \$7.6 million of additional funding to amplify partnerships with legal aid agencies. These agencies included the Senior Law Center, Philadelphia VIP, and Community Legal Services.

The 'hits kept on coming', including an unprecedented record preservation and digitalization project, and hosting the Pennsylvania Register of Wills Association convention for the first time since 1964.

With gratitude and appreciation,

Tracey L. Gordon
Register of Wills
& Clerk of the Orphans' Court



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ABOUT US

Who We Are



"The primary goal of the Philadelphia Register of Wills office is to provide quality customer service. Especially during the difficult time when you may be grieving the loss of a loved one."

We are a state agency under the 1st Judicial District of Pennsylvania. Our mission is to preside over the protection of generational wealth.

Our staff of experts at the @PHLROW provide guidance and assistance through an array of city resources and services. In addition, our office administers critical functions pertaining to wills, estates, and guardianship.

EXPERT STAFF



THE FIRST 100 DAYS

with COVID-19 Restrictions

During Register Gordon's first 100 days she proposed a series of goals to accomplish during her term in office, that would provide a new level of support from the Register of Wills to the citizens of Philadelphia. Her goals were as follows along with when they are achieved.



PEOPLE DEVELOPMENT



TIME MANAGEMENT



IMPLEMENTATION

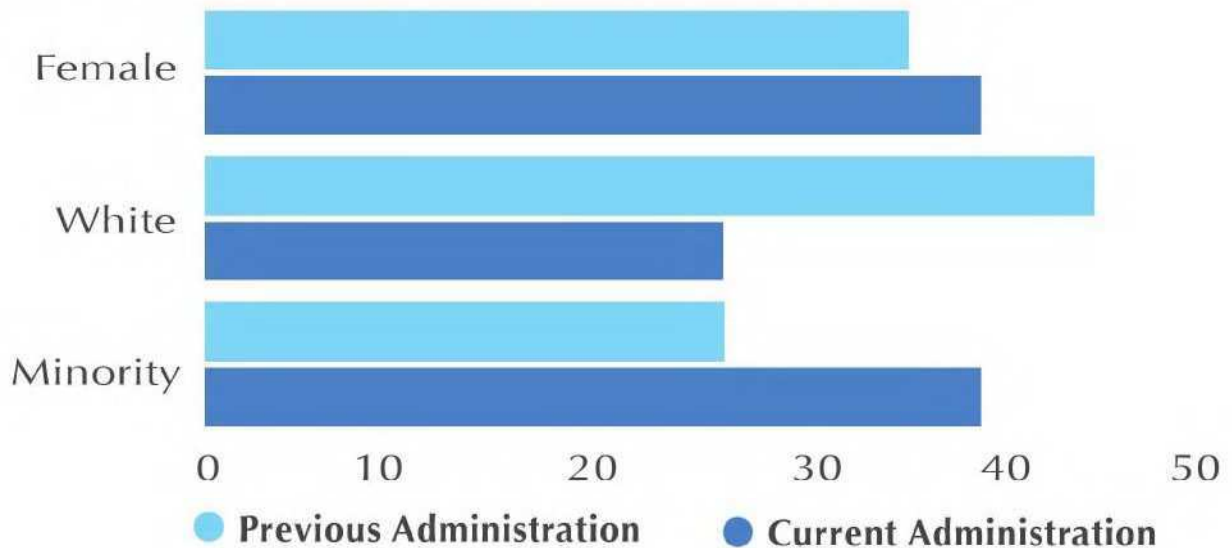
- | | |
|---|--|
| ● Explored office's ability to waive or reduce probate filing fees. | February 21st 2020 with Philadelphia's nonprofit legal agencies. |
| ● Created a plan for ongoing educational workshops throughout the city. | February 29th 2020 started the Plan. Prepare. Protect education tour. |
| ● Created a program to deal with the "Tangled Title" epidemic. | June 6th 2020 the Probate Deferment Initiative Pilot Program begins. |
| ● External Office Audit. | February 2020 |
| ● Restructured the office for efficiency. | May 2020 |
| ● Evaluated all current staff. | February 2020 |
| ● Increased diversity in the Register of Wills Office & Orphans' Court. | June 2020 |
| ● Conducted a competitive process and selected a vendor for website design. | Worked with the city to create a web page that launched in February 2021. |
| ● Began performance audits. | February 2020 |
| ● Created performance evaluation. | December 2020 |
| ● Established satellite offices. | September 2023 |

GOALS ACHIEVED

Register Gordon

Register Gordon made it a focus to diversify the office during her term. It was important to her to have the office reflect the citizens of Philadelphia.

EMPLOYEE DIVERSITY, EQUITY AND INCLUSION



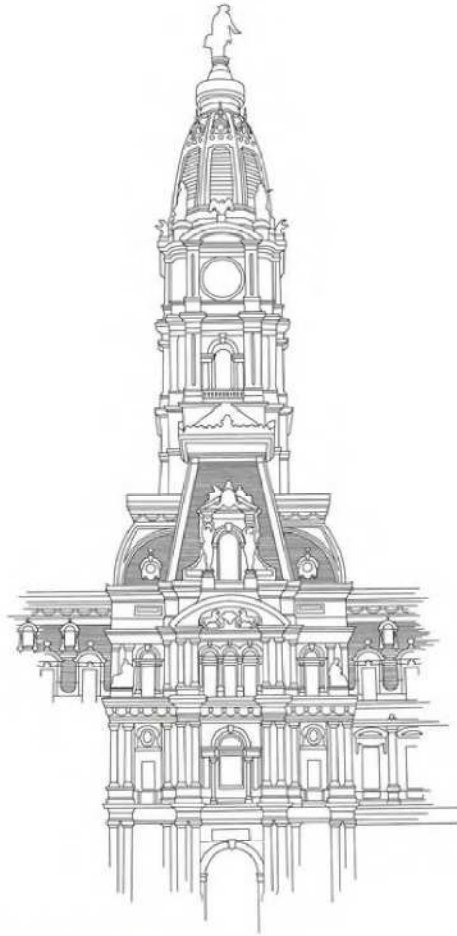
Register Gordon was the first Register of Wills to create an Outreach and Communications department so everyone can gain access to the Register of Wills office. Her firm belief in education along with the COVID-19 Pandemic was a driving force to assure everyone in the City of Philadelphia knew what the Register of Wills office does and share the resources to help everyone make a Will.

OUR OUTREACH ASSISTANCE PROGRAM



- LEARN MORE BY:
FOLLOW @ PHILROW on Social Media
- Visit Website: phila.gov/wills
or Scan the QR Code.





FINANCIAL REPORT

2020 - 2024

REGISTER OF WILLS
CITY OF PHILADELPHIA



FINANCIAL REPORT

2020 - 2024

Under the leadership of the **Honorable Tracey L. Gordon**, the office became essential and stayed open throughout the Covid-19 Pandemic. ROW was the first in the Commonwealth to establish virtual services in the Probate Department and issue marriage licenses to essential workers.

BUDGET REPORTS TABLE 1: Budget Recovery from COVID-19 10% Cut

EMPLOYEE COMPENSATION	FY 2020	FY 2021	FY 2022	FY 2023	FY 2024 P
PERSONAL SERVICES	4,523,524	4,169,220	4,221,695	4,089,658	4,089,658
EMPLOYEE BENEFITS					
PURCHASE OF SERVICES	237,805	217,320	181,769	406,959	406,959
MATERIALS & SUPPLIES	33,773	45,420	70,298	86,379	86,379
EQUIPMENT	96,528	42,832	45,367	5,761	5,761
CONTRIBUTIONS, ETC.					
PAYMENTS TO OTHER FUNDS					
TOTALS	4,891,630	4,474,792	4,519,129	4,588,757	4,588,757
MARRIAGE LICENSE	390,724	396,399	471,588	571,421	517,421
INHERITANCE TAX COMMISSIONS	705,818	585,415	666,855	671,089	671,089
RECORDING FEES	1,963,773	2,642,853	3,149,640	3,278,197	3,278,197
COURT COST	702,973	822,971	943,617	970,854	970,854
TOTALS	3,763,288	4,447,638	5,231,700	5,437,561	5,437,561
	(1,128,342)	(27,154)	712,571	848,803	848,803

TABLE 2: Revenue Goal VS. Actual Revenue



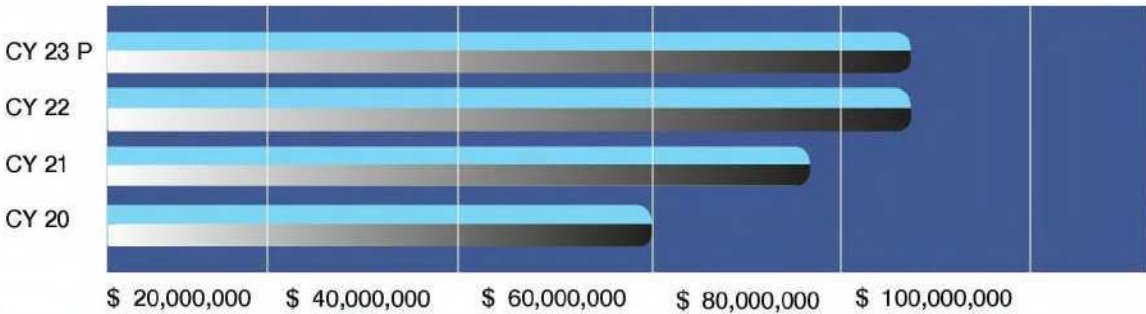
INHERITANCE TAX

Inheritance Tax Percentage Increase: Current vs Previous Administration

During Register Gordon's term the revenue sent to the state grew over 37%

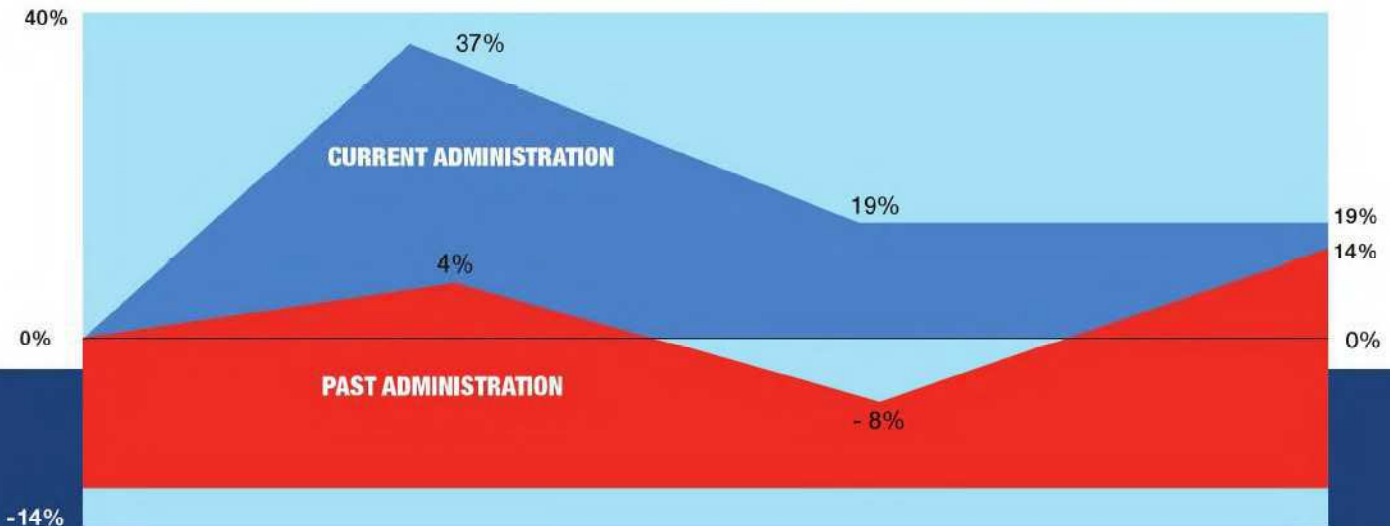
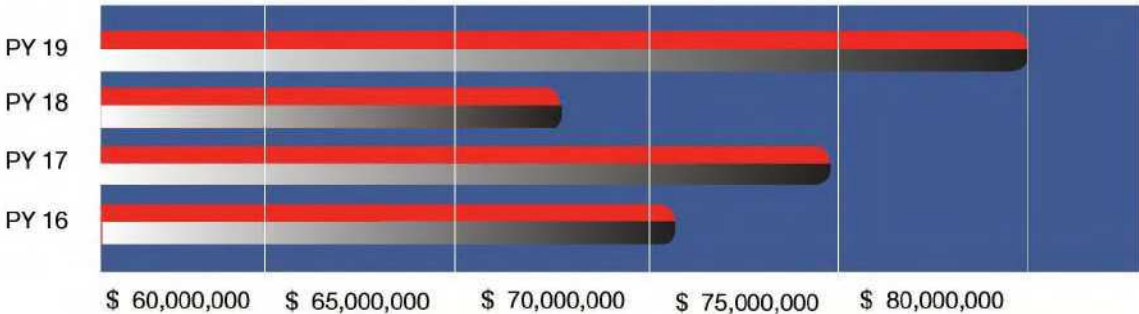
CURRENT YEAR	CY 20	CY 21	CY 22	CY 23 P
AMOUNT	\$ 65,888,632	\$ 90,432,990	\$ 107,526,654	\$ 107,526,654

CURRENT ADMINISTRATION



PREVIOUS YEAR	PY 16	PY 17	PY 18	PY 19
AMOUNT	\$ 72,152,191.00	\$ 74,744,497.00	\$ 68,779,060.00	\$ 78,374,854.88

PREVIOUS ADMINISTRATION



TIMELINE TRACEY L. GORDON REGISTER OF WILLS

MAY 17, 2019
WINS
DEMOCRATIC
PRIMARY BY 44%



FEBRUARY 10, 2020
REGISTER GORDON
PEW
CHARITABLE TRUST
CONDUCTS STUDY
TANGLED TITLE
CRISIS



MARCH 16, 2020
CITY OFFICES CLOSE
DUE TO
COVID-19 PANDEMIC
WE NEVER CLOSED

JANUARY
6TH
2020
BEGINS
TERM

JANUARY 21, 2020

REGISTER GORDON
ESTABLISHES
FIRST COMMUNITY
OUTREACH DEPT.

FEBRUARY 29, 2020

PLAN, PREPARE
PROTECT TOUR
BEGINS TO COLLECT
& EDUCATE THE
COMMUNITY PROTECTING
GENERATIONAL WEALTH



NOVEMBER 2020

REGISTER GORDON
CONTINUES THE
PLAN, PREPARE
PROTECT TOUR

DECEMBER 8, 2020

REGISTER ISSUES A
PSA WITH PHILLY VIP
TO PARTNER WITH
HELPING FAMILIES WITH
"TANGLED TITLES"

DECEMBER 21, 2020

REGISTER GORDON HOSTS
AN INFORMATIVE MEETING
ABOUT THE PROBATE
DEFERMENT INITIATIVE
AT THE NAC NEIGHBORHOOD
ADVISORY COMMITTEE

2020

DECEMBER 4, 2020

REGISTER GORDON
CONNECTS WITH THOMAS MITCHELL,
MacARTHUR GENIUS AWARD WINNER,
TO DISCUSS STEPS PHILADELPHIA HAS
TAKEN TO TACKLE "TANGLED TITLES"
AS WELL AS INCORPORATE SOME OF THE
IDEAS FROM PROFESSOR MITCHELL



MAY 24, 2022

REGISTER GORDON
RECEIVED THE
2022 LEGACY
HARRIET TUBMAN AWARD

AUGUST 1, 2022

REGISTER GORDON
WAS AWARDED A BUDGETARY
AWARD FOR MAKING ACCURATE
AND TIMELY DECISION
WITH FUNDING

OCTOBER 20, 2022

REGISTER OF WILLS
OFFICE HELD A
LEADERSHIP TRAINING
SESSION FOR
SUPERVISORS

2022

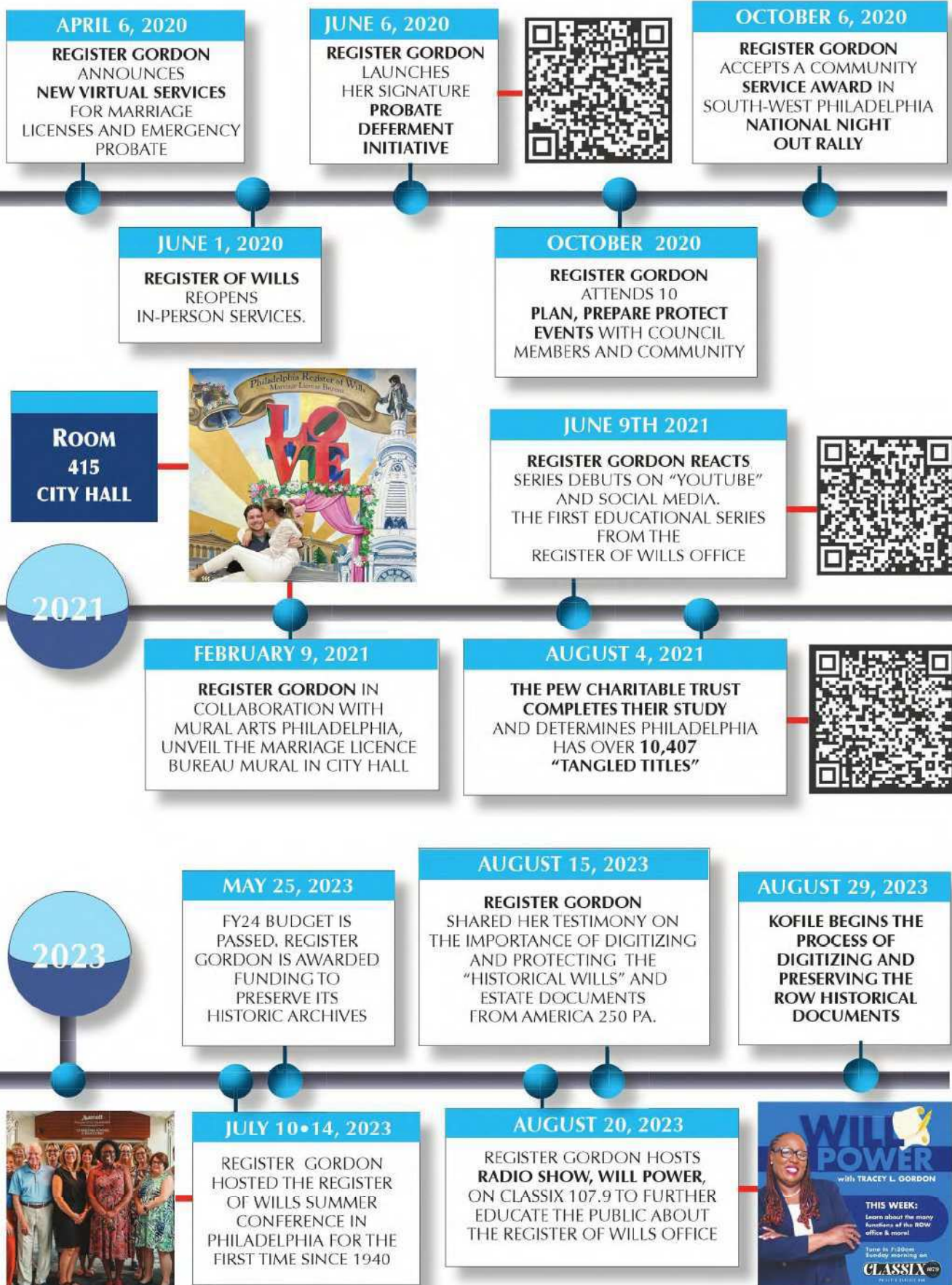
JUNE 20, 2022

REGISTER GORDON
PARTNERS WITH
DELI MUSIC CENTER TO
HOST COMMERCIALS
FOR THE PROBATE
DEFERMENT INITIATIVE PSA'S.

SEPTEMBER 20, 2022

REGISTER GORDON
ACCEPTED HER AWARD FOR
WOMEN WHO LEAD IN
EXCELLENCE CELEBRATION
AT THE MOVIE STUDIO GRILL.







TANGLED TITLES

What is a Tangled Title?

A tangled title is a property that hasn't been updated to reflect new ownership. Often this happens when:

- A property owner dies without leaving a "Will". In this case the official ownership of the property is unclear, and may be shared by all of the person's heirs.
- A property owner dies and leaves a "Will" that names a new owner, but the deed transfer isn't properly recorded.
- A "Fraudulent" deed is recorded.
- A "Rent-To-Own" agreement goes wrong

A "Tangled Title" will keep you from negotiating payment agreements with a bank, paying off back taxes, or qualifying for support like basic system repair grants.



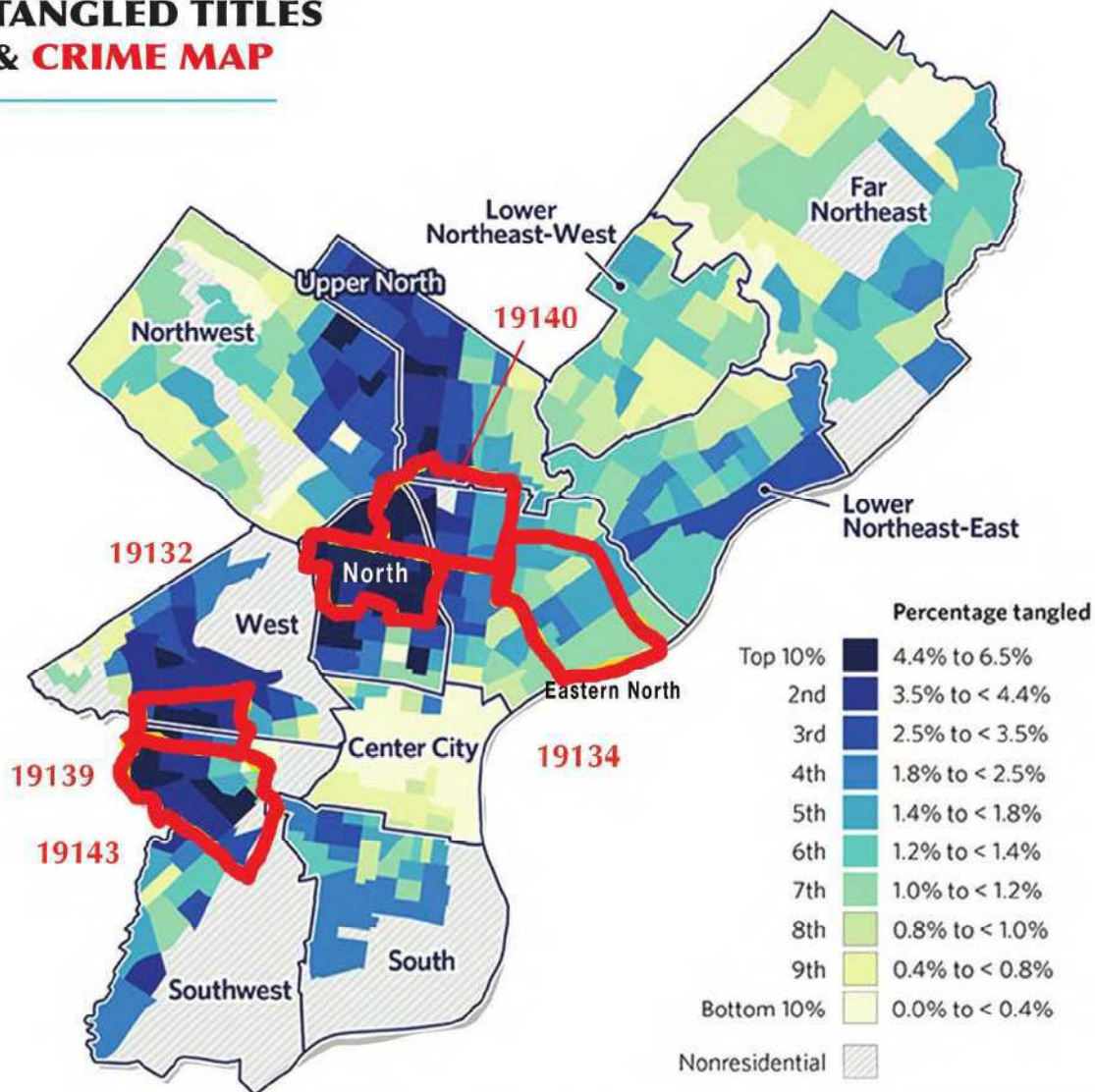
[READ THE FULL REPORT ABOUT TANGLED TITLES FROM PEW CHARITABLE TRUST \(SCAN THE ABOVE CODE\)](#)

Register Gordon was the first city officer to address the "Tangled Title" pandemic in Philadelphia. Additionally, she began her "Plan, Prepare, Protect Tour" during the COVID-19 Pandemic to Educate Philadelphians in the affected areas about the importance of having a "Will".

Per the request of Register Gordon, PEW CHARITABLE TRUST has identified a geographical map of where the most crimes of "Tangled Titles" are in the City of Philadelphia.

Outlined in "Red" on next page are the "Zip Codes" of the hardest hit "Crime Areas."

TANGLED TITLES & CRIME MAP



At the request of Register Gordon, PEW CHARITABLE TRUST has identified a geographical map of where the most “Crimes” and “Tangled Titles” are in the City of Philadelphia.

Philadelphia has at least 10,407 “Tangled Titles”. The hardest hit areas are predominantly “Black” households, while the least affected are “White” households.

Although the median assessed value of these homes - (\$88,800) - is lower than the city-wide median of \$134,300, the properties are still collectively worth over \$1.1 billion, representing a significant amount of family wealth.

Most affected as shown on the above map are North, Upper North, West, and Southwest Philadelphia areas. These areas contain more than half of the city’s “Tangled Titles”.



PROBATE DEFERMENT INITIATIVE (PDI)

What is the PDI Program?

The Probate Deferment Initiative (PDI) connects low-and middle income residents with the resources they need to untangle their homes' titles.

This may include:

- Referral to Free legal counsel.
- Deferment of probate fees by the Register of Wills.
- Waiver of deed recording fees by the Department of Records.
- PDI can help you get legal ownership of your home and avoid problems caused by a "Tangled Title". You can also create a Will a Will and protect your family's generational wealth.

Contact Information:

Office: 215.686.8278

E-mail: monique.w.jordan@phila.gov



[MORE INFORMATION \(SCAN THE ABOVE CODE\)](#)

"THE AFFORDABLE HOME IS THE ONE YOUR FAMILY OWNS"



HISTORICAL ARCHIVES

Register of Wills Office (ROW)

During Register Gordon's term in office she has made great strides to get the "Historical Archives" of the Register of Wills office digitized and preserved. She has been working with **Kofile Technologies**, a pioneer in Critical Records Management. Kofile has earned the trust of 3,000+ county, local and state governments to transform brittle, mouldy, and deteriorating records.

The Register of Wills office currently has records dating back to the 1600's . Some of these documents hold important genealogical information and are the only records available for family members. Without digitalization and preservation these records could be gone forever.

Probate Records of Philadelphia are not just legal documents; they are the testament to the lives and legacies of individuals who shaped this city's history. Preserving these records ensures that we honour the individuals who built our community and continue to learn from their experiences.

Access to knowledge is no longer limited by geographical constraints, anyone with an internet connection can explore the stories of Philadelphia's past residents, gaining insights into their lives aspirations, and contributions.





MARRIAGE LICENSE

NYT Feature & Partnership with Mural Arts

DID YOU KNOW ?

During the Covid 19 pandemic, between April 2020 and June 2020 the Marriage Department of Philadelphia completed over 600 “Virtual Marriages”. Our office was the first office in the Commonwealth to officiate “virtual” marriages.

Pennsylvania is one of the few states that couples can marry without an officiant. This is called Quaker License (self-Uniting)

The Register was featured in the New York Times Article written by:

Tammy La Gorce Published April 9, 2020

The New York Times



Scan to read the full article.

Register Gordon commissioned a “Marriage selfie mural” created by Mural Arts staff artist Nathaniel Lee from Mural Arts Philadelphia. The Installation features favorite “Philly Photo Spots” for newly-weds across the city, from the “Love Sculpture” to the iconic “William Penn Statue” top of city Hall. You can view the mural in room 415 in City Hall.



The City of Philadelphia Mural Arts Program is a public art project that works in partnership with communities, city agencies, schools and grass-roots philanthropic organizations. A nonprofit organization founded in 1986.

AWARDS

& Will Education Around the City

2023

**Fair Housing
Award**

2022

Budget Award
For consistently
submitting budget
documents on-time
and accurately to enable
well informed, and timely
decisions.



2023

**Deborah Cutie-
Castenada Award**
for Affirmatory
Furthering
Fair Housing

2022

**Bar Association
Award**



2023

**The Black Clergy
of Philadelphia &
Vicinity & The
Philadelphia NAACP
"I Have A Dream"
Life and Legacy Award**

2022

**Real Property
Section Good
Deed Award**



2023

**Pennsylvania
Women's
Empowerment
Initiative
Empowerment
Initiative Spirit Award**

2022

**National Action
Network
Harriet Tubman
Award**



**"You don't make a "Will" when you get
old You make a "Will" when you get an Asset."**

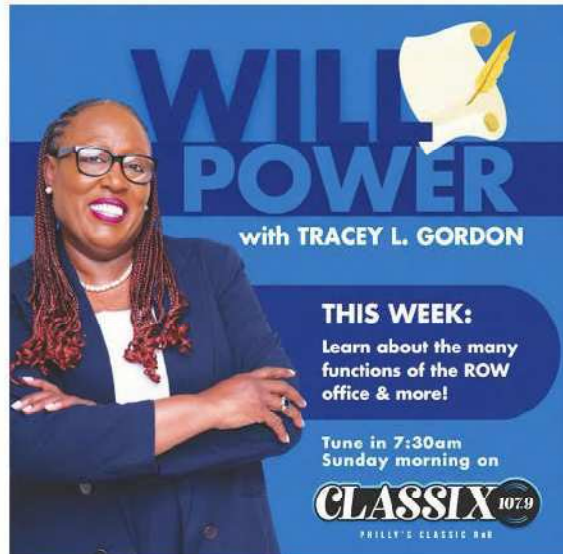
A main highlight of Register Gordon's term was beginning an "Outreach Department" to spread the word about the Register of Wills office around Philadelphia.



REGISTER OF WILLS

Featured in:

"An investment in Knowledge pays the best interest."
Benjamin Franklin



Scan to listen
to Podcast !

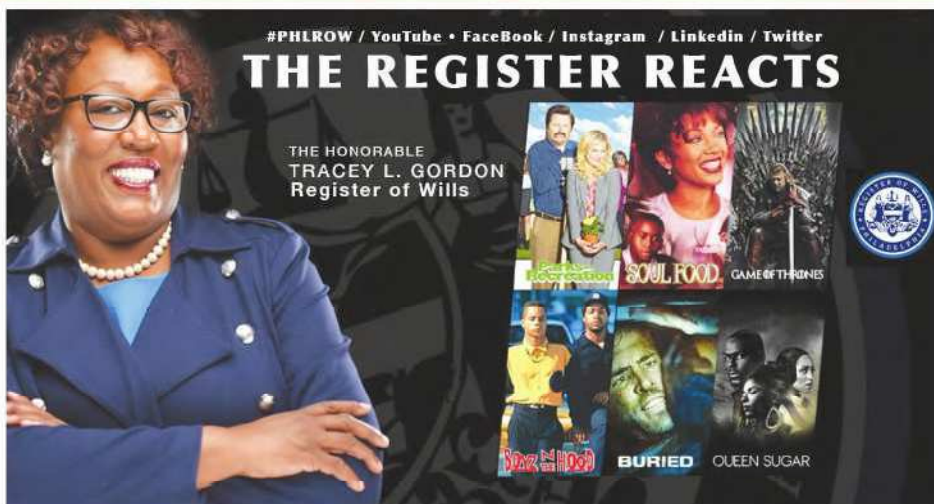


The New York Times

The Philadelphia Inquirer



Pennsylvania ★ Capital-Star



Scan to Watch
YouTube now !





THE BASICS OF A HOLOGRAPHIC WILL

8 COMPONENTS

1 A handwritten document prepared by the decedent or someone at the decedent's request.

2 Best to have the document dated but not mandatory.

3 The decedent must be of sound mind and not be under any undue influence.

4 Specify who the executor will be.

5 The document should be clear as to who receives the estate.

6 Must be signed at the very end of the document.

7 Best to have 2 witnesses but not mandatory.

8 Best to have a notary but not mandatory.

WILL WISDOM

Write your questions and notes here.

CHECK OUT OUR EDUCATIONAL VIDEOS & FOLLOW US @ PHLROW !

PHILA. GOV/WILLS



A First Impressions Design 2023

**HONORABLE TRACEY L. GORDON
REGISTER OF WILLS**

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DEFENSEB00478